PROSPECTING TIPS
FOR FINANCIAL ADVISORS

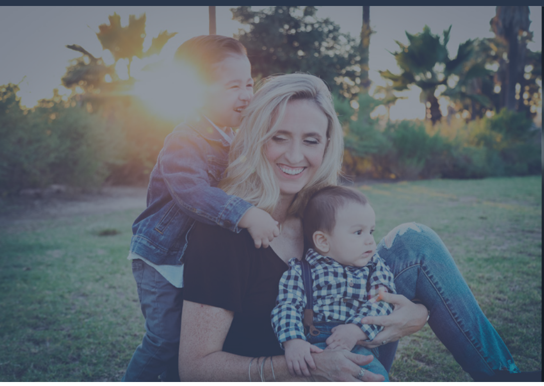
OVERVIEW:
When you're a financial advisor, new clients are an incredibly valuable asset. If you're looking to be successful in the long term, you need to constantly be on the lookout for ways to grow your database.

Print out these prospecting tips and hang them in your work space, to remind you of the power of connections.

WHAT'S INCLUDED:
- **Prospecting Tips for Financial Advisors**
  Practical suggestions for leveraging your existing client relationships and starting new ones.

PROSPECTING TIPS

FOR FINANCIAL ADVISORS



MEET THE REST OF THE FAMILY.

As the Baby Boomer generation ages, more and more Generation X and Millennial children are receiving their inheritance and saving for their own future families. Be sure to start building those relationships now.

CONNECT ON SOCIAL MEDIA.

Find a mutual connection who might need your services, then send a friend request on Facebook or ask to connect on LinkedIn.

HOST A SEMINAR.

A free presentation on a financial topic is too good an offer for many people to pass up! Speak on a topic you know well, and use the opportunity to network with new prospects.

CREATE A NEWSLETTER.

You can offer value to current clients and prospects alike by curating content from around the web.

SEND SOMETHING OF VALUE.

Offering value to prospects is a great way to convert them to paying customers. For example, you could send a copy of your magazine from ReminderMedia to a friend or colleague of one of your clients.

ASK FOR A REFERRAL.

At the end of the day, you thrive on referrals. When they aren’t happening naturally, don’t be afraid to ask your current clients to make these valuable introductions for you. You’ll be glad you did.